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Research and Planning Newsletter

Utah Division of Travel Development

December 1999

Utah Visitors – A Closer Look

By Jon Kemp, Research Coordinator

Whether you are an elected official responsible for determining policy regarding tourism development, a savvy entrepreneur hoping to break into the travel and tourism market or develop an effective ad campaign, or a researcher trying to discover the latest facts and figures on travel and tourism in Utah, you need reliable data profiling Utah visitors. Recent data acquired by the Utah Division of Travel Development from D.K. Shifflet & Associates, Ltd. provides an in-depth look at the demographics, travel patterns and activities of visitors to Utah in 1998.

Who are the visitors to Utah?

In 1998, families comprised nearly a third (32%) of all non-resident overnight visitors to Utah. Adults traveling alone occurred with equal frequency (32%). Couples (20%) and other small adult parties (16%) were the remaining groups traveling. Compared to the U.S. as a whole, Utah attracts a relatively higher percentage of families and almost as many single adults. Conversely, Utah attracts fewer couples and other small adult parties. With a higher relative share of families coming to Utah, the average overnight group size in Utah of 2.7 persons is higher than the national average of 2.4 persons.



Baby-boomers, aged between 35 and 40, were the most common travelers to Utah in 1998. The average age of all travelers to Utah was nearly 43 years old, slightly younger than the national average of over 44 years old. Generation X-ers (between 18 and 34) comprised 35% of all travelers while Seniors (55 and over) represented the smallest age group with 22% of the total. Given the slightly lower average age of Utah's overnight visitors, it is not surprising that the average household income of visitors is also slightly lower than the national

average (\$58,300 in Utah compared to \$58,900 nationally). However, Utah visitors are more likely to have either attended or graduated from college than visitors to the rest of the U.S.

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GOVERNOR APPOINTS TRAVEL COUNCIL BOARD MEMBERS

by Tracie Cayford, Communications Director

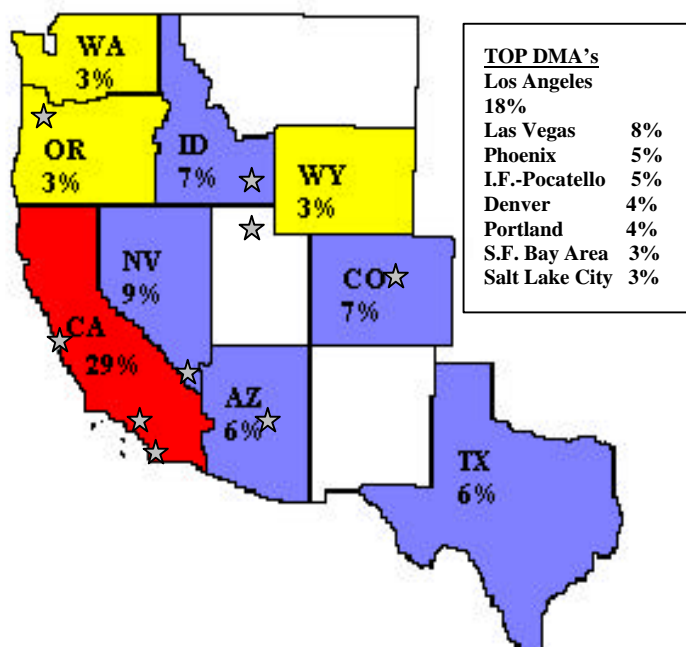
Governor Michael O. Leavitt has appointed two new members to the Utah Travel Council Board of Commissioners. The recent appointments are Howard Brinkerhoff, Jr. of Altamont and Joe Houston of Kanab.

"I am continually impressed with the high caliber of candidates the governor appoints," says Dean Reeder, director of the Utah Travel Council, Division of Travel Development. "Their knowledge of rural Utah will especially be beneficial," Reeder adds.

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Top Origin States of Travel to Utah

1998 Non-Resident Overnight Travel



Where do Utah visitors come from?

Utah is a regional destination with over 70% of all non-resident overnight visitors arriving from the western U.S. California was home to the largest share of visitors (29%) followed by Nevada (9%) Idaho and Colorado (7% each). Visitors from Arizona, Texas, Washington, Oregon and Wyoming were also common to the state. The Midwest and Eastern U.S. were home to approximately 23% of all non-resident overnight visitors although the numbers were spread out across several states. As might be expected from the most common origin states, the most popular cities/metropolitan areas of residence mirrored the population centers of the most popular states. California was home to three areas, including the largest, Lost Angeles (18%), as well as the San Francisco Bay area (3%) and San Diego (3%). Other popular cities included Las Vegas (8%), Phoenix (5%), Idaho Falls-Pocatello (5%), Denver (4%), Portland (4%) and Salt Lake City (3%, MSA area includes part of Idaho, Wyoming and Nevada).

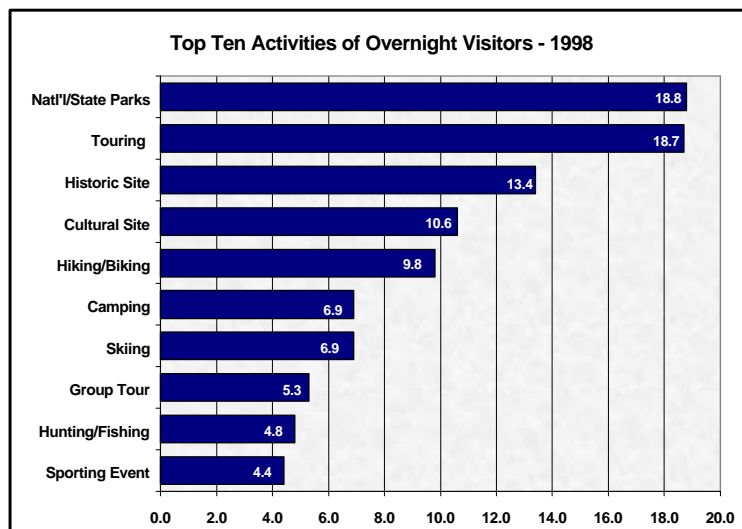
Why do visitors choose Utah?

In 1998, eight out of every ten visitors came to Utah for leisure purposes, either visiting friends or family, taking a general vacation, attending a special event or enjoying a getaway weekend. Only 20% arrived for business purposes. Among business travelers, the most common reasons for coming to the state included seminars, training, conventions, sales and consulting. Compared to national averages, a relatively higher share of overnight visitors travel to Utah for leisure purposes, specifically to visit friends and family or enjoy a general vacation. Half of all overnight visitors stayed in a hotel or motel. Another 33% stayed in a private home. The average stay in 1998 among overnight travelers was 3.6 nights. As expected, two-thirds (67%) of all visitors arrived by motor vehicle. Air travel was also popular, attracting 25% of all overnight travelers.

What do visitors do while in Utah?

Not surprisingly, most overnight visitors to Utah participated in some type of outdoor recreation activity. The most popular activities in 1998 were visiting a national or state park and touring (sightseeing) with approximately 19% of all visitors engaging in these activities respectively. Also popular were historic sites (13%), cultural sites (11%), hiking and biking (10%), skiing (7%), camping (7%), hunting or fishing (5%) and group tours (5%).

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Visitors also enjoyed a significant amount of ancillary purchasing activities such as shopping, dining in restaurants and general entertainment. These activities produced almost half (44%) of the average daily expenditures. Shopping was recorded as a primary activity by 28% of all visitors. Dining (24%) and general entertainment (19%) were also frequently enjoyed activities.

The information in this article is taken from a nationwide household survey on travel in the U.S. Details on Utah travelers were compiled using DIRECTIONSÖ software from D.K. Shifflet & Associates, Ltd.

For more information on Utah visitors, a copy of the 1998 Non-resident Overnight Visitor Summary, or other inquiries, please contact Jon Kemp, Research Coordinator, Utah Division of Travel Development at (801) 538-1317 or via email at Jon@utah.com

What impact do travelers have on the Utah economy?



The volume of non-resident visitors to Utah increased slightly in 1998 to an estimated 17.8 million. These visitors generated a significant economic impact. It is estimated that traveler spending in 1998 increased from 1997's record levels to approach \$4.1 billion. Travel-related spending from out-of-state visitors generated an estimated \$328 million in state and local tax revenue, or roughly \$157 dollars per Utah resident. Overnight non-residents spent an average \$87 dollars per day during their stay in Utah. Tourism is one of Utah's top five economic activities and represented approximately 8.5% of Utah's 1998 Gross State Product. An estimated 115,000 jobs were created directly or indirectly from travel and tourism related industries in 1998, or nearly on in nine jobs throughout the state.

How can visitor profile information be used?

Visitor profiles provide useful information that enables decision makers in government, business and academic environments to guide development towards improving the quality of travel and tourism throughout the state. For example, national trends indicate that nearly 50% of the adult U.S. population participates in adventure travel activities

(TIA, 1999 Outlook for Travel and Tourism). The Utah visitor profile indicates that outdoor recreation represents a significant portion of all travelers to Utah. Further analysis indicates some demographic similarities between those persons who engage in adventure travel and the typical Utah visitor. As this segment of the U.S. travel market continues to grow, businesses and/or communities may choose to enhance their capability to attract and accommodate adventure travelers.

Another segment of the U.S. travel market that is increasing is family travel. Recent findings by the U.S. Travel Data Center reported that family vacation trips had increased 55% since 1992. As a destination chosen more often by families than any other group, this increase suggests an opportunity for Utah's travel and tourism partners. Visitor profiles are useful tools that help identify strategies for tourism development, insight into business opportunities and background for further research.

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### **MILLENNIAL SCENIC CALENDAR AVAILABLE**

*By Tracie Cayford, Communications Director*

The Utah Travel Council is bringing in the Millennium with its Utah 2000 Annual Scenic Calendar. The award-winning calendar, highlighting Utah's destinations and festivals, is now available. Thirteen large photographs, suitable for framing, are featured in this year's publication. In addition to the spectacular scenic photos, the calendar also includes dozens of smaller pictures and a message from Governor Michael O. Leavitt.

"I know that the images in this calendar will inspire you throughout the year 2000. But don't just enjoy the pictures; make this the year you experience for yourself, Utah's beauty, heritage, and culture," said Governor Leavitt.

As is previous years, the colorful calendar depicts the wonders of Utah in breathtaking photos by some of the world's most sought after photographers.

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## 1999 State and County Economic and Travel Indicator Profiles

The 1999 State and County Economic and Travel Indicator Profiles is an annual publication produced by the Division of Travel Development that contains statistics on major tourism economic indicators as well as selected visitation counts for the state and Utah's 29 counties. Several components of the travel and tourism industry are measured in an attempt to better understand the state's overall tourism system. "As the economic impact of travel and tourism continues to increase around the state, elected officials and economic development planners are faced with evermore complex tourism planning issues," says division director Dean Reeder. "The report is intended to serve as a resource guide for tourism planning at both the state and local levels," Reeder adds.

### 1998 Highlights

**Direct and indirect tourism-related employment** rose 3.1 percent over 1997 to 115,500.

**Traveler expenditures** increased a modest 2.5% over 1997 to \$4.1 billion. The **total tax** impact from traveler spending was \$328 million including over \$85 million to local communities.

**Transient room tax collections** were up 4% percent in 1998 totaling \$17.4 million. The average annual growth in transient room tax collections since 1993 has been a remarkable 10.1% each year.

**Total non-resident visits** increased slightly to an estimated 17.8 million in 1998.

**International visitation** decreased for the second straight year, mainly due to a strong dollar, slow recovery in Asia and stagnant growth in Europe.

**Visits to Utah's national parks, monuments and recreation areas** were flat for 1998, remaining at approximately 10.4 million visitors.

**Skier visits** for the 1998-99 ski season increased by 1.4% percent over the 1997-98 season.

**Vehicle traffic** at Utah's interstate highway state lines increased a healthy 4.8% percent in 1998. Total interstate vehicle traffic for 1998 was estimated at 19.6 million

**Salt Lake International Airport passengers** decreased in 1998 by -3.7% percent. Total air passengers, however, remained over 20 million for the third straight year

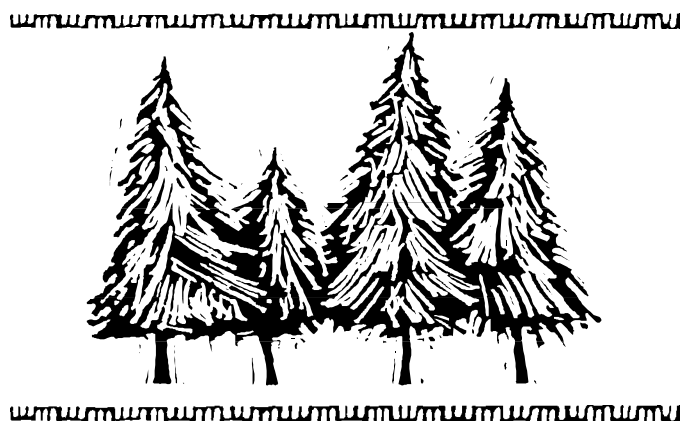
**NOTE:** The Utah Travel Council collected these numbers from various reporting agencies.

## NEW BOARD MEMBERS, Continued from page 1

Brinkerhoff is on the front lines of the tourism industry in Utah as the co-owner and developer of Falcon's Ledge, a world-class fly-fishing and bird watching resort in northeastern Utah. "We need to look at additional ways to develop travel into the state of Utah," states Brinkerhoff, a master falconer, who says wildlife watching is one of the fastest growing segments of the outdoor recreation market.

Houston has been involved in Utah's food service industry for 25 years. He is currently one of the owners of Houston Trail's End Restaurant and Catering in Kanab and Red Rock Adventures, a Kane County-based company that offers high-adventure vacations on horseback in southern Utah. "I look forward to helping Utah make the transition from the traditional windshield mode of tourism to the development of destination tourism," says Houston.

The board advises the division on tourism-related issues and is made up of travel industry and community leaders from around the state. The appointments fill two vacancies on the board. Doug Knell of Cedar City and Meg Hatch of Vernal recently completed their terms. During their collective 16 years of dedicated service, they provided invaluable insight and direction to the Travel Council. They helped raise the awareness for the state's travel regions and increased the presence of the state's guides and outfitters. Their vision contributed greatly to the long-range strategic plan of the division. The Utah Division of Travel Development extends its appreciation for their many years of service helping improve tourism and travel in Utah.



## Utah Image and Awareness: The 1999 European Study

The 1999 European Survey was a large-scale telephone survey conducted in five European countries (France, Germany, Italy, United Kingdom, Holland) from March to June 1999. The survey serves as a benchmark of Utah's awareness and images among Europeans prior to the 2002 Winter Olympics. A similar study two years following the Olympic Games will allow a measure of the impact of the Games on Utah's awareness and images among Europeans. This longitudinal study will provide a useful perspective for assessing the state's efforts in meeting specific long-term tourism objectives.

### *Summary of Key Findings*

- Europeans' unaided recall of Utah as a state in the American West is very low (8% on average).
- When Western States are named, Utah had on average the lowest percentage of recognition among the state's major competitors (72%).
- Less than 10% of the respondents knew which state was hosting the 2002 Winter Olympic Games (unaided recall).
- 19% of the respondents knew that Salt Lake City was the host city of the 2002 Olympic Games (unaided recall).
- In unaided recall, the top three images that Europeans have of Utah include: the LDS church, desert and mountains. Generally, imagery is stereotypic and weak.
- Skiing was very weak in terms of image and awareness across all countries.
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**NOTE:** Gary J. Bamossy, Department of Marketing, University of Utah, and Vrije Universiteit, Amsterdam the conducted Survey.



## **SCENIC CALENDAR**, Continued from page 3

More than 2,000 photographs were submitted this year for consideration. Unique to the calendar this year is a focus on many of Utah's annual festivals and celebrations. The cover features a view of the The Watchman formation in Zion National Park.

Other areas of the state featured in the millennial edition include: Mt. Timpanogos; Arches, Bryce, Canyonlands and Capitol Reef National Parks; Flaming Gorge National Recreation Area; Fish Springs National Wildlife Refuge; The Bonneville Salt Flats; and the Wasatch-Cache National Forest.

35,000 calendars were printed for 2000. Supplies are limited, so customers are encouraged to purchase their calendars early. The calendar makes a great gift for visitors, friends, and business associates.

Individual orders (1-49) may be purchased through the Zion Natural History Association (ZNHA) Bookstore, located at Council Hall in Salt Lake City, and at many book and gift stores around the state. The *retail price* is **\$10.59**. Orders of 50 or more may be purchased directly from the Utah Travel Council, 300 N. State Street, Salt Lake City, Utah, 84114. For *bulk orders*, the calendars are **\$6.35** each, plus tax and shipping.

## **Did You Know ...**

**The 21<sup>st</sup> Century Utah Travel Guides are printed and available at Visitor Information Centers across the state. The Travel Guide is the primary piece used to promote Utah nationally and internationally. Hundreds of thousands of copies are distributed annually.**

**This year the Travel Guide is accompanied by the *Utah Accommodations Guide*, produced by the Utah Hotel and Lodging Association. The Accommodations Guide is a companion to the Travel Guide, and includes information on lodgings of all sorts, as well as campgrounds and listings for Utah's outfitters and guides.**

### *1999 Third Quarter Visitor Statistics*

| Segments                          | July      | August    | September | YTD 1999   | YTD 1998   | % Change    |
|-----------------------------------|-----------|-----------|-----------|------------|------------|-------------|
| S.L. Int'l Airport Passengers     | 1,932,356 | 1,919,222 | 1,566,331 | 15,313,260 | 15,551,822 | 1.5%        |
| National Park Recreation Visits   | 750,156   | 847,885   | 780,244   | 4,620,193  | 4,619,032  | 0.0%        |
| Nat'l. Monuments/Recreation Areas | 826,596   | 736,604   | 538,763   | 3,656,128  | 3,393,548  | 7.7%        |
| Utah State Parks                  | 1,211,773 | 990,016   | 721,332   | 5,837,480  | 5,998,857  | -2.7%       |
| Visitor Information Centers       | 129,738   | 116,206   | 84,787    | 625,385    | 657,602    | -4.9%       |
| Hotel/Motel Occupancy Rates       | 68.5%     | 73.2%     | 62.2%     | 64.6%      | 66.4%      | -1.8 points |



#### FAST FACT

Utah's Top International Markets are:

1. Canada
2. Germany
3. France
4. TheUnited Kingdom
5. Japan

#### **Utah Travel Barometer**

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